

Self Service – Allotments

Introduction

This guide provides the procedures for how to view, change, add or stop a member's Voluntary Deductions.

Starting an allotment

The start date for all allotments must always be the first of the month. If starting an allotment during a mid-month calendar, the start date will default to the first of the current month. If starting an allotment during an end-month calendar, the start date must be greater than or equal to the first of the next month.

Changing an allotment

Changes to account names and account types are not allowed on existing allotments. If one of these need to be changed, stop the allotment and restart it with the new information. If changing the amount during a mid-month calendar, the change date will default to the first day of the current month. If changing the amount during the end-month calendar, the change date must be greater than or equal to the first of the next month. Enter the amount in dollars and cents. Do not enter a dollar sign. If changing the Routing/Account numbers, the change date must be greater than or equal to the first of the current month no matter which pay calendar it is entered. If changing the End Date, it must be the last day of the month.

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Stopping an allotment

There are two ways to stop an allotment:

1. Enter an End Date in the End Date field and click the Save Deduction button at the bottom of the page. Enter the last day of the month the allotment deduction shall be made. For example, if the member wants the last allotment payment to be made one 1 March 2015 payday, enter 02/28/2015 as the End Date and click **Save Deduction**.

Verify the allotment stop date appears in the end date column correctly. If there is an error, click the **Edit** icon (pencil), correct it and save the deduction again.

Deductions					
Element	Amount	Begin Date	End Date	Recipient	
Mutual Assistance Donation	\$2.000000	06/01/2002		Cg Mutual Assistance Campaign	
Savings	\$1420.000000	10/01/2012		ACE VENTURA	
Tricare Dependent Dental	\$32.890000	01/01/2014		METLIFE DENTAL PROGRAM	
Savings	\$115.000000	12/01/2014	02/28/2015	SNOWFLAKE	

2. To stop an allotment **immediately**, click **Stop Deduction** at the bottom of the page. If stopping an allotment during the mid-month calendar, the stop date will default to the last day of the previous month. If stopping an allotment during the end-month calendar, the stop date will default to the last day of the current month.


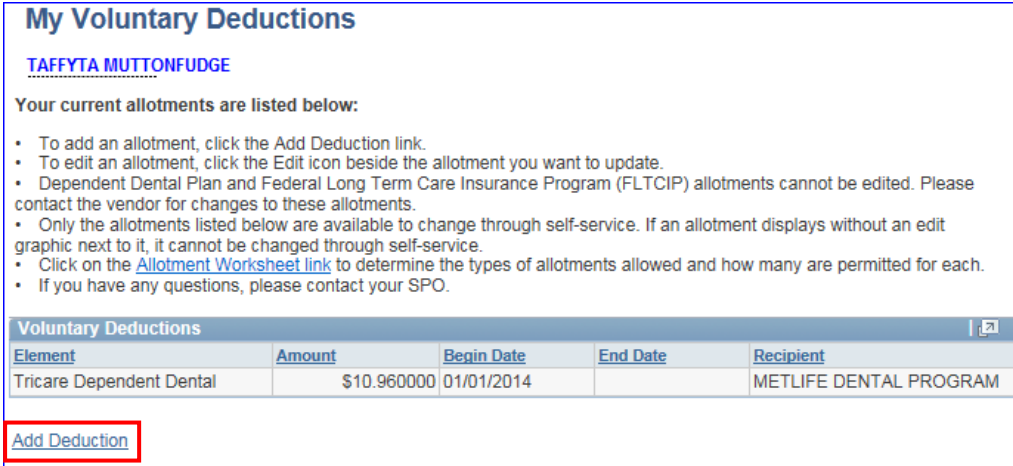
The **Stop Deduction** can also be used to “delete/Undo” a pending allotment. For example, if an allotment is input with a Start Date of 02/01/2015, and then prior to the end-month February payroll finalize date, the member decides he/she does not want the allotment to start, click the **Stop Deduction** button. This will stop/swap the allotment effective 01/31/15, and the allotment will be deleted from the Allotment Summary page.

When the Stop Deduction button is used on an existing allotment, it will be removed from the Allotment Summary page.

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Procedures See below.

Step	Action
1	<p>Select the Allotments link under Tasks in the Employee Pagelet.</p>  <p>The screenshot shows the 'Employee' pagelet with three columns: Profile, Tasks, and View. The 'Allotments' link is highlighted in the 'Tasks' column. Other links in the 'Tasks' column include PCS eResumes, My Airport Terminal Orders, Emergency Contacts, Home and Mailing Address, Phone Numbers, Direct Deposit, Federal & State Tax Elections, All Duty Report, and 9 More... The 'View' column contains links like My Profile, Member Training Rating, My Reserve Points Statement, My Reserve Drills, View My Payslips (AD/RSV), My Employee Reviews, Employee Review Summary, Off Comparison Scale Summary, SWE PDE, and 5 More...</p>
2	<p>The member's current Allotments will display. Review the bullets before making any changes. In this example, a deduction will be added. Click Add Deduction.</p>  <p>The screenshot shows the 'My Voluntary Deductions' page for TAFFYTA MUTTONFUDGE. It lists current allotments and provides instructions on how to add or edit them. A table titled 'Voluntary Deductions' shows one allotment: Tricare Dependent Dental with an amount of \$10.960000, a begin date of 01/01/2014, and a recipient of METLIFE DENTAL PROGRAM. The 'Add Deduction' button is highlighted at the bottom.</p>

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Procedures,
continued

Step	Action
3	<p>Review the bullets, then enter the Account information. When entering the Account Number, the number must start completely aligned to the left of the block (make sure there are no spaces before the number). Next, click the Save Deduction.</p> <div data-bbox="352 633 1369 1576"> <p>My Voluntary Deductions</p> <p>Taffyta Muttonfudge</p> <p>Enter Allotment information:</p> <ul style="list-style-type: none"> Allotments for current month can be started or changed prior to current mid month payroll cut. Click on the Processing Schedule link to determine the mid month payroll cutoff dates. Allotments can be started or changed for future month. If you want to stop your allotment immediately, press the Stop Deduction button below. If pressed prior to end-month Compute cutoff, your stop will be effective at the end of the prior month (any deductions from your mid-month pay will be refunded in your end-month pay). If pressed after end-month Compute cutoff, your stop will be effective at the end of the current month. If you want to stop your allotment during a future month, or at the end of the current month, you can stop the allotment by entering an End Date below and then pressing the Save Deduction button. Allotments must be set up for payment by direct deposit / electronic funds transfer. <p>Deduction: Savings</p> <p>Amount: 150.000000</p> <p>Begin Date: 09/01/2014 31 Type:</p> <p>End Date: 31 Policy #:</p> <p>Who receives this deduction</p> <p>Recipient:</p> <p>Account Name: MY SAVINGS</p> <p>Bank Routing #: 314074269 Usaa Federal Savings Bank</p> <p>Account Nbr: 123456789</p> <p>Account Type: Savings Payment Method: Bank Transfer</p> <p>Save Deduction Stop Deduction Return to Summary</p> </div>
4	<p>Once saved, this screen will display. Click Return to Summary.</p> <div data-bbox="352 1653 727 1888"> <p>Save Confirmation</p> <p> The Save was successful.</p> <p>Return to Summary</p> </div>

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Procedures, continued

Step	Action																								
5	<p>The change will be reflected in the Allotments list.</p> <div><p>My Voluntary Deductions</p><p><u>TAFFYTA MUTTONFUDGE</u></p><p>Your current allotments are listed below:</p><ul style="list-style-type: none">• To add an allotment, click the Add Deduction link.• To edit an allotment, click the Edit icon beside the allotment you want to update.• Dependent Dental Plan and Federal Long Term Care Insurance Program (FLTCIP) allotments cannot be edited. Please contact the vendor for changes to these allotments.• Only the allotments listed below are available to change through self-service. If an allotment displays without an edit graphic next to it, it cannot be changed through self-service.• Click on the Allotment Worksheet link to determine the types of allotments allowed and how many are permitted for each.• If you have any questions, please contact your SPO.<table><tr><th colspan="6">Voluntary Deductions</th></tr><tr><th>Element</th><th>Amount</th><th>Begin Date</th><th>End Date</th><th>Recipient</th><th>Edit</th></tr><tr><td>Savings</td><td>\$150.000000</td><td>09/01/2014</td><td></td><td>MY SAVINGS</td><td></td></tr><tr><td>Tricare Dependent Dental</td><td>\$10.960000</td><td>01/01/2014</td><td></td><td>METLIFE DENTAL PROGRAM</td><td></td></tr></table><p>Add Deduction</p></div>	Voluntary Deductions						Element	Amount	Begin Date	End Date	Recipient	Edit	Savings	\$150.000000	09/01/2014		MY SAVINGS		Tricare Dependent Dental	\$10.960000	01/01/2014		METLIFE DENTAL PROGRAM	
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